

# FOUNDATION FOR THE ADVANCEMENT OF INSURANCE PROFESSIONALS

GEORGE W. HAENSZEL SCHOLARSHIP

APPLICATION FORM

*(Please print clearly or type)*

## Required Materials:

1. Completed application.
2. Letter from applicant explaining:
   1. How the scholarship funds will be used to help you be a future/better leader in the independent agency system or a future/better agency owner or partner.
   2. What changes you would like to see in the agency in the next 5 years.
3. Nomination letter from the Agency Principal.

**Scholarship funds are intended to supplement or provide financial support to Next Gen independent insurance agents who do not receive funds from their employer for professional development and insurance designations.**

Please submit application and required materials to [katherine@ohioinsuranceagents.com](mailto:katherine@ohioinsuranceagents.com)

Your application is not complete until we receive

items #1, 2 and 3 (as applicable).

Use this column to answer questions on the left.

Add sheets as needed.

|  |  |
| --- | --- |
| Date |  |
| First Name, Middle Initial, Last Name |  |
| Agency Name and Address |  |
| Telephone (include Area Code) |  |
| Email Address |  |
| Is your agency a member of OIA? |  |
| Agency size defined by premium volume?  Small: up to $5M; Midsize: $5 to $10M; Large: over $10M |  |
| Are you employed full time in the agency? |  |
| Hire Date |  |
| Position in Agency |  |
| Degree and/or Current Designations |  |
| Are you currently an independent insurance agency owner or partner? (YES / NO)  IF YES, what year did you become an agency owner or partner? |  |
| Do you anticipate becoming an Agency Owner or Partner in the future? (YES / NO)  IF YES, in 1-3 years? 4-5 years? Or over 5 years or unknown? |  |
| Date of Birth |  |

|  |  |
| --- | --- |
| What Agency Management System does your agency use? |  |
| How many full-time employees work in the agency? |  |
| Does your employer provide financial support to employees for insurance industry professional development, designations and/or attendance at industry conferences? |  |
| If so, what is the maximum benefit amount? |  |
| What do you plan to do with the funds if you are awarded the scholarship? (List only **one** item. Additional requests can be made later.) |  |
| Amount requested? (maximum is $2,500) |  |

## How will you use the scholarship funds if awarded?

## Check below what you are applying for. (Click on product to learn more)

|  |  |  |  |
| --- | --- | --- | --- |
| **CHECK HERE** | **ORGANIZATION** | **AGENCY OPERATIONS EDUCATION** | **INVESTMENT** |
|  | OIA | [Valuation](https://ohioinsuranceagents.com/product-services/valuation-and-perpetuation/)  (Future service only) | $2,500/initial valuation  $1,500/repeat valuation |
|  | OIA | [Business Education Services](https://ohioinsuranceagents.com/product-services/business-consulting/)  (Future service only) | Price Varies |
|  | OIA | [Agency Link](https://ohioinsuranceagents.com/product-services/agency-link/)  (Future service only) | Price Varies |
| **CHECK HERE** | **ORGANIZATION** | **PROFESSIONAL DEVELOPMENT** | **INVESTMENT** |
|  | OIA and The National Alliance | [CIC Designation](https://learning.ohioinsuranceagents.com/designations)  (5 classes for minimum investment of $2,100) | $420 per class |
|  | OIA and The National Alliance | [CISR Designation](https://learning.ohioinsuranceagents.com/designations)  (5 classes for minimum investment of $900) | $180 per class |
|  | Beyond Insurance | [Trusted Risk Advisor Certification](https://www.beyondinsurance.com/our-solutions/trusted-risk-advisor)  (4 classes for minimum investment of $1,600) | $400 per class |
|  | American Insurance Marketing and Sales (AIMS) Society | [CPIA Designation](https://www.aimssociety.org/page/Designation)  (3 classes for minimum investment of $567) | $189 per class |
|  | The National Alliance | [CRM - Certified Risk Manager](https://www.scic.com/crm/)  (5 classes for minimum investment of $2,150) | $430 per class |
|  | International Risk Management Institute, Inc. | [AFIS Certification - Agribusiness and Farm Insurance Specialist](https://www.irmi.com/certifications/agribusiness-farm-insurance-specialist)  (5 classes for minimum investment of $675) | $135 per class |
|  | The Institutes | [AAI Designation - Accredited Advisor In Insurance, The Institutes](https://web.theinstitutes.org/designations/accredited-adviser-insurance)  3 courses + Ethics  Total Requirements: 4  3-6 Months to complete | Materials:  $150 to $265  Exam:  $155 to $185 |
| **CHECK HERE** | **ORGANIZATION** | **EVENT** | **INVESTMENT** |
|  | OIA | [Next Gen Summit](https://ohioinsuranceagents.com/product-services/next-gen/) | $200 Registration |
|  | OIA | [IACON](https://ohioinsuranceagents.com/upcoming-events/iacon23/) | $250 Registration |
|  | OIA | [Advocacy Day](https://ohioinsuranceagents.com/upcoming-events/advocacy-day/) | Up to $189 if hotel stay is needed |
|  | Big I | [Big I Legislative Conference](https://www.independentagent.com/Events) | Registration and Hotel |
|  | Big I | [Big I Fall Leadership Conference / Young Agents Leadership Institute](https://www.independentagent.com/Events) | Registration and Hotel |
|  | Big I | [Agents Council on Technology Meetings](https://www.independentagent.com/Events/Pages/AgentsCouncilForTechnology/default.aspx) | Registration and Hotel |
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Important Notes:

* A scholarship will only be granted if there is an educational component.
* Successfully passing the course is required for reimbursement.
* Reimbursement for a class will not be granted for any classes taken prior to the scholarship approval date.
* Scholarships awarded for Agency Operations Education are applied to future services only.
* Scholarships for designations will be awarded for one class at a time. The applicant can reapply for subsequent classes using the same application.
* The scholarship is non-transferable and will only be applied to the agent to whom it was awarded.
* The scholarship awarded may be less than the amount requested.